

CRM BASICS

ADD A CONTACT

Each customer needs to have a **contact** , in order to:

- Call
- Send Emails
- Send Activity Notes

A customer must have a contact linked, who is set to **Receive Sales Calls**.

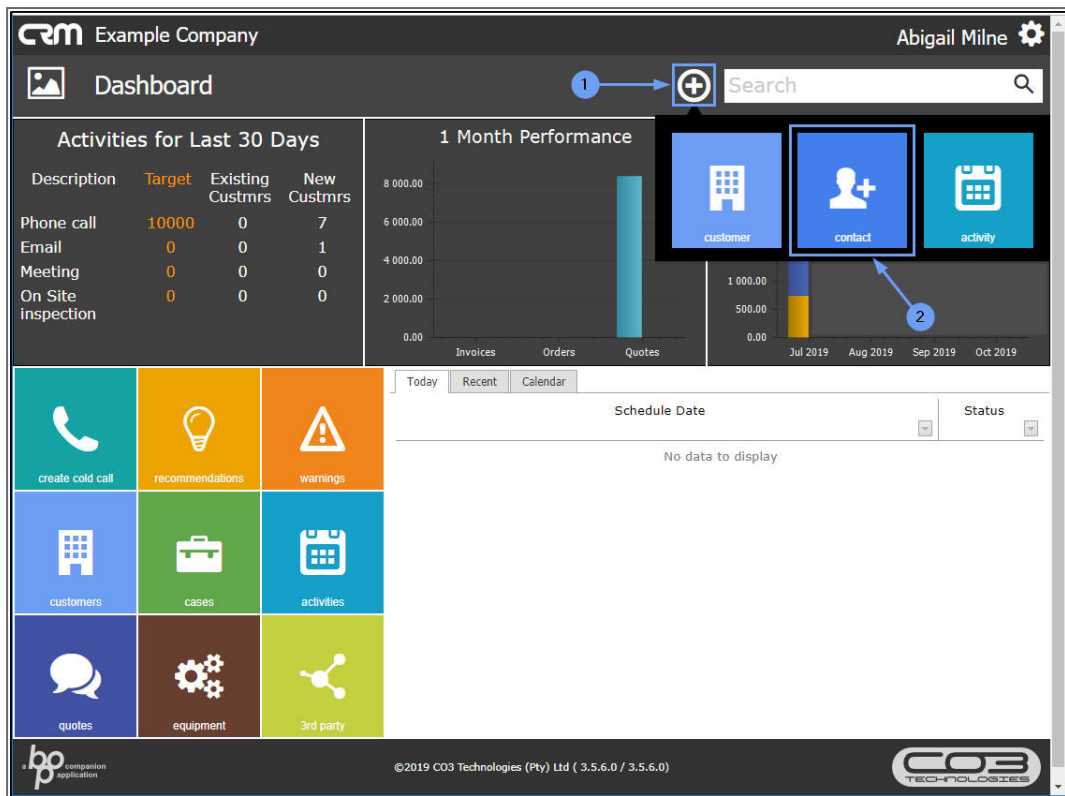
It is important to remember that additional contact people will need to be configured later within BPO2:

- In order for a customer to be approved within BPO, an **Accounts Contact** is required. This contact will receive invoicing.
- Each customer should have a **Primary Contact**. This person will receive notifications regarding service call status changes.
- You can also [add a contact in the Save Customer page](#).

Access: Webpage - [http://\[servername\]:\[portno\]/BPOCRM/User.aspx](http://[servername]:[portno]/BPOCRM/User.aspx)

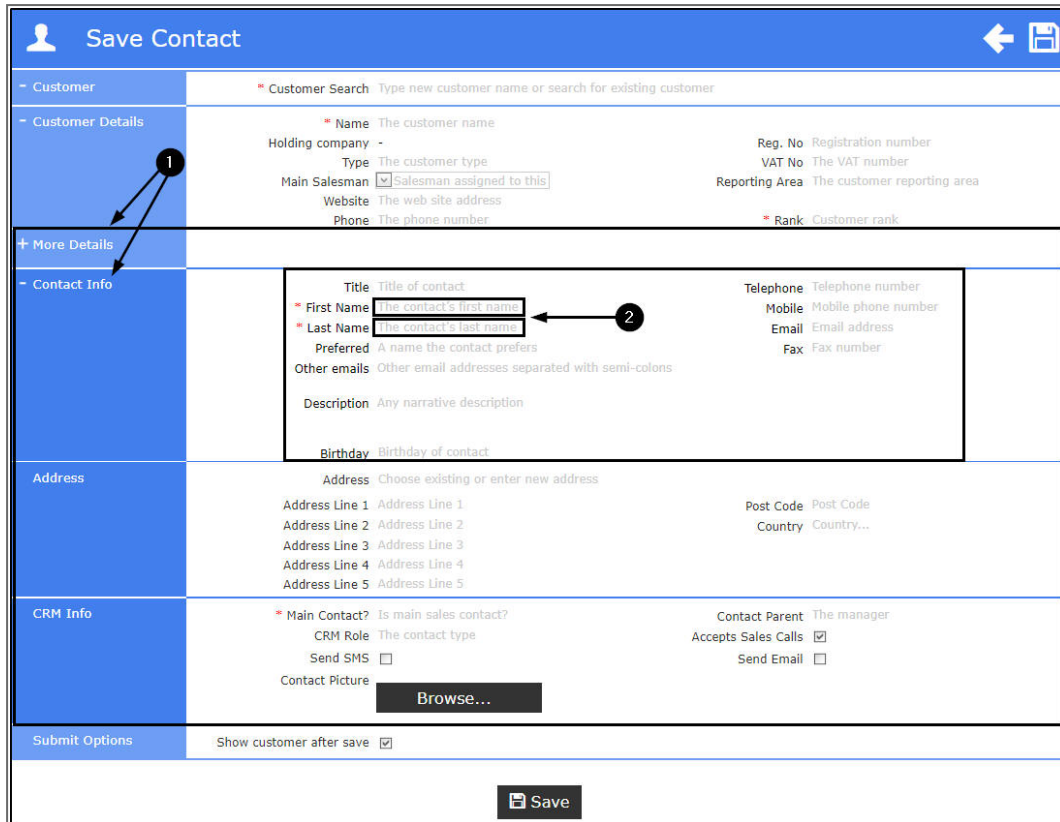


ADD NEW CONTACT FROM THE HOMEPAGE

- Click on the **Add new items...** icon.
- Click on the **Contact** tile.




CONTACT INFO MANDATORY FIELDS

1. The **Save Contact** screen will open with the **More Details** section automatically expanded to display the **Contact Info** frame.
2. Click in the mandatory fields [*] and type in the contact details.
 - **Note:** that only the **First Name** and **Last Name** fields are mandatory but you can add details to all the fields in this section if you have the information on hand.


Save Contact



Customer	* Customer Search Type new customer name or search for existing customer
Customer Details	<div> <div> * Name The customer name </div> <div> Holding company - <div> Type The customer type </div> </div> </div> <div> <div> Main Salesman <input checked="" type="checkbox"/> Salesman assigned to this </div> <div> Website The web site address </div> <div> Phone The phone number </div> </div> <div> <div> Reg. No Registration number </div> <div> VAT No The VAT number </div> <div> Reporting Area The customer reporting area </div> </div> <div> * Rank Customer rank </div>
+ More Details	
Contact Info	<div> <div> Title Title of contact </div> <div> * First Name The contact's first name </div> <div> * Last Name The contact's last name </div> <div> Preferred A name the contact prefers </div> <div> Other emails Other email addresses separated with semi-colons </div> <div> Description Any narrative description </div> <div> Birthday Birthday of contact </div> </div> <div> <div> Telephone Telephone number </div> <div> Mobile Mobile phone number </div> <div> Email Email address </div> <div> Fax Fax number </div> </div>
Address	<div> Address Choose existing or enter new address </div> <div> Address Line 1 Address Line 1 </div> <div> Address Line 2 Address Line 2 </div> <div> Address Line 3 Address Line 3 </div> <div> Address Line 4 Address Line 4 </div> <div> Address Line 5 Address Line 5 </div> <div> Post Code Post Code </div> <div> Country Country... </div>
CRM Info	<div> * Main Contact? Is main sales contact? </div> <div> CRM Role The contact type </div> <div> Send SMS <input type="checkbox"/> </div> <div> Contact Picture <input type="button" value="Browse..."/> </div> <div> Contact Parent The manager </div> <div> Accepts Sales Calls <input checked="" type="checkbox"/> </div> <div> Send Email <input type="checkbox"/> </div>
Submit Options	Show customer after save <input checked="" type="checkbox"/>


Save

CUSTOMER SEARCH

NEW CUSTOMER

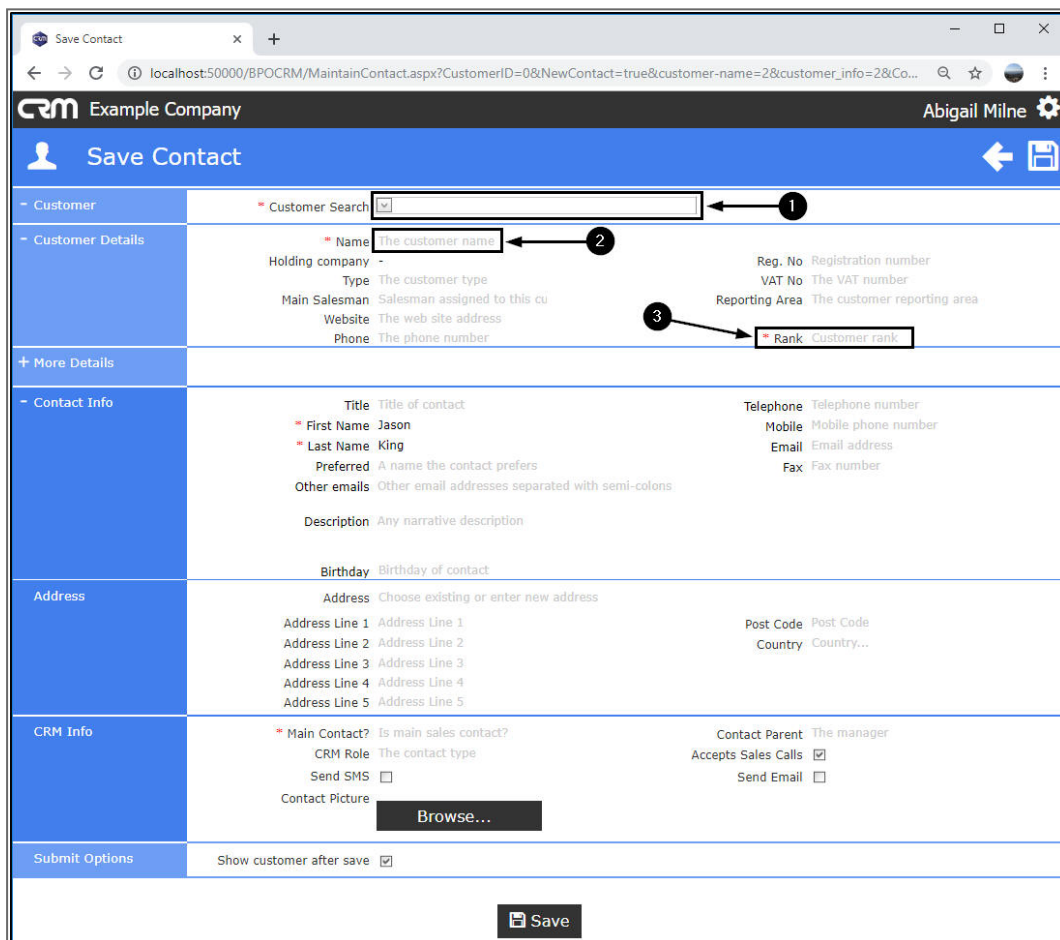
If you are adding the contact details for a **new** customer:

1. Go to the **Customer** frame, click in the **Customer Search** field and type in the new customer name.
2. Go to the **Customer Details** frame. As you click anywhere in this frame, the **Name** field will auto populate with the same text that was typed into the **Customer Search** field.
3. Click in the **Rank** field and select from the drop-down list the Rank **Call Cycle** for this new customer (e.g. **Platinum** Rank = the call cycle for this customer is every **15** days).

Rank is based on how much you **value** this customer and helps to define the call cycle per client. For example, a **Wood** ranking indicates that you will only contact this customer every **365** days - this customer is not valuable to you. However a **Platinum** ranking indicates that this is a very important customer that you wish to maintain a good relationship with, therefore you will contact them every **15** days.

Each customer must be linked to a Rank in CRM. **Customer Rank** can also be linked in the Customer Maintenance screen in BPO2.

The above mentioned fields are mandatory [*] but you can add details to all the fields in these frames if you have the information on hand.



The screenshot shows the 'Save Contact' form in a web browser. The form is titled 'Save Contact' and is part of the CRM system. It contains several sections with various fields for customer information. Numbered callouts (1, 2, 3) highlight specific fields:

- 1: Customer Search field
- 2: Name field (labeled 'the customer name')
- 3: Rank field (labeled 'Rank Customer rank')

The form sections and their fields are as follows:

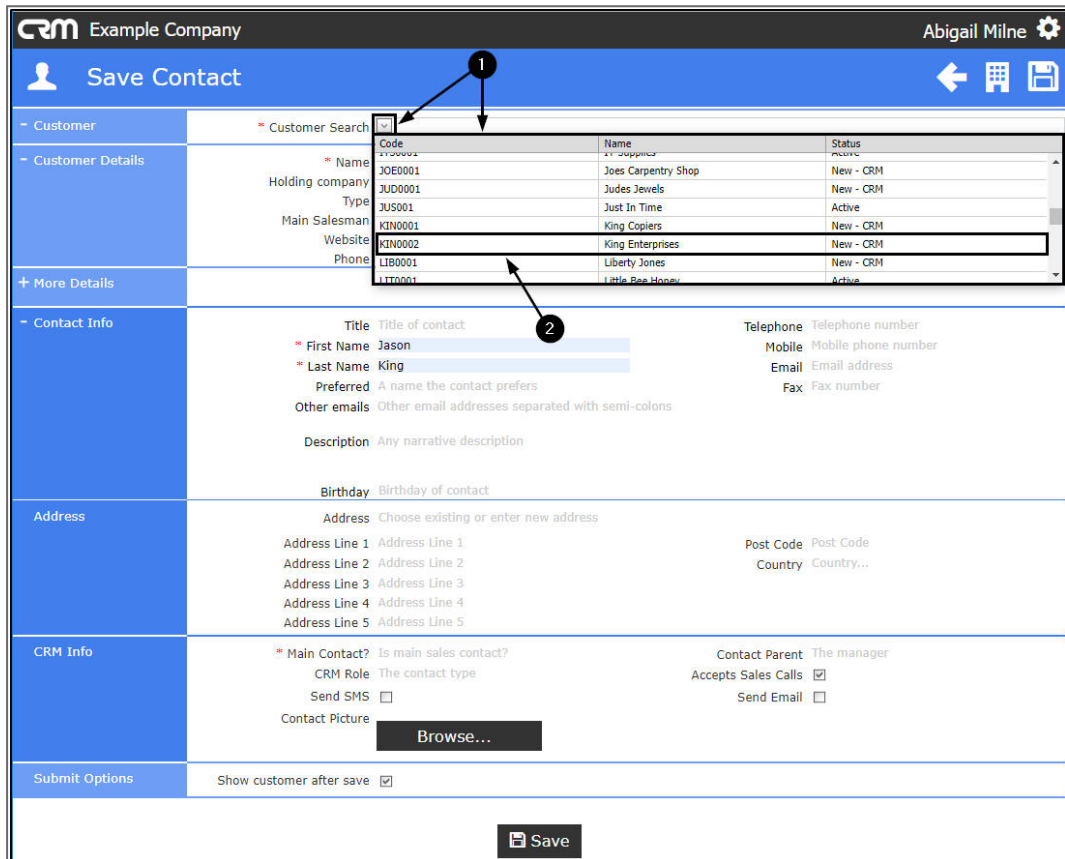
- Customer**
 - Customer Search (1)
- Customer Details**
 - Name (2)
 - Holding company
 - Type
 - Main Salesman
 - Website
 - Phone
 - Reg. No.
 - VAT No.
 - Reporting Area
 - Rank (3)
- More Details**
- Contact Info**
 - Title
 - First Name (Jason)
 - Last Name (King)
 - Preferred
 - Other emails
 - Description
 - Telephone
 - Mobile
 - Email
 - Fax
- Address**
 - Address
 - Address Line 1
 - Address Line 2
 - Address Line 3
 - Address Line 4
 - Address Line 5
 - Post Code
 - Country
- CRM Info**
 - Main Contact?
 - CRM Role
 - Send SMS
 - Contact Picture (Browse...)
 - Contact Parent
 - Accepts Sales Calls
 - Send Email
- Submit Options**
 - Show customer after save

At the bottom of the form is a 'Save' button.

CURRENT CUSTOMER

If you are adding the contact details for a **current** customer:

1. Hover over the **Customer Search** field, a drop-down arrow will be revealed. Click on this arrow to display a list of all the customers on the system.
2. Select the relevant customer to be linked to the new contact.



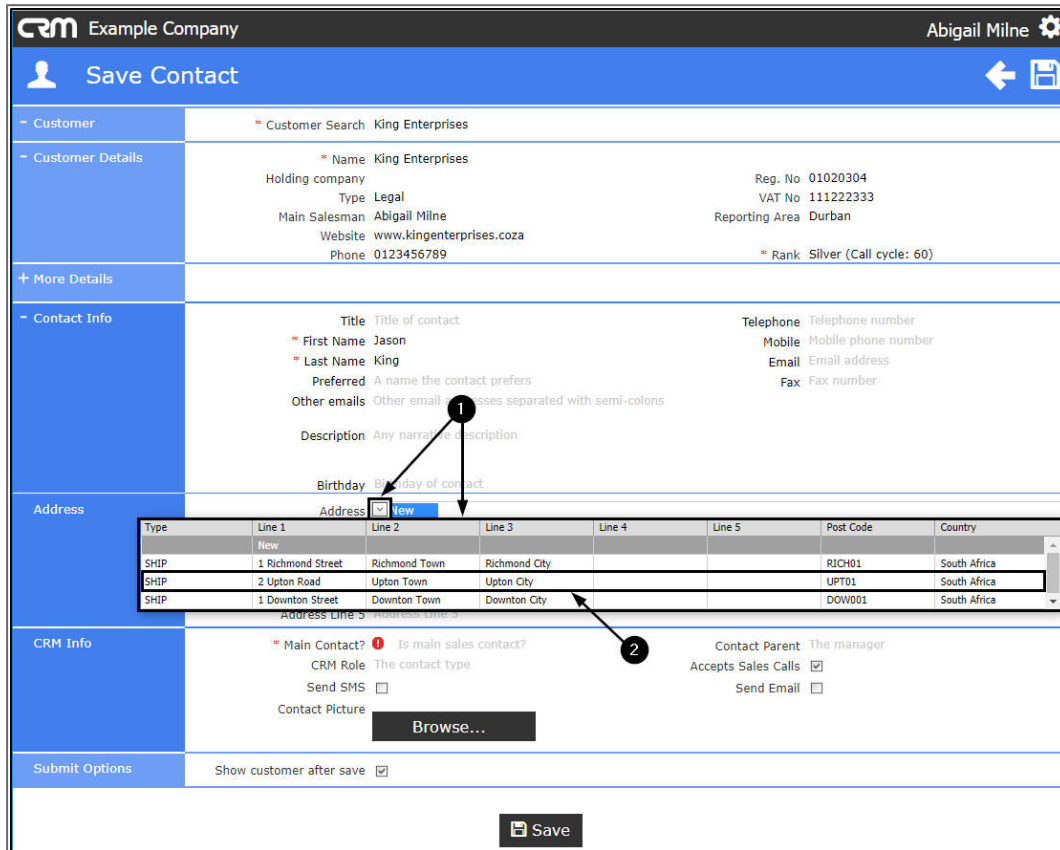
The screenshot shows the 'Save Contact' form in the CRM system. The 'Customer Search' field is highlighted with a red box and a red arrow pointing to it. A dropdown menu is open, showing a list of customers with columns for Code, Name, and Status. The dropdown menu is also highlighted with a red box and a red arrow pointing to it. The form includes sections for Customer Details, Contact Info, Address, CRM Info, and Submit Options.

Code	Name	Status
JOE0001	Joes Carpentry Shop	New - CRM
JUD0001	Judes Jewels	New - CRM
JUS001	Just In Time	Active
KIN0001	King Copiers	New - CRM
KIN0002	King Enterprises	New - CRM
LIB0001	Liberty Jones	New - CRM
LIT0001	Little Bee Honey	Active

SELECT AN ADDRESS

If this is a current customer already loaded into CRM, you can select an **address**.

1. Hover over the **Address** field, a drop-down arrow will be revealed. Click on this arrow to display a list of all the shipping addresses linked to this customer.
2. Select the relevant address to be linked to the new contact.



CRM Example Company Abigail Milne

Save Contact

Customer * Customer Search King Enterprises

Customer Details

* Name King Enterprises
 Holding company
 Type Legal
 Main Salesman Abigail Milne
 Website www.kingenterprises.co.za
 Phone 0123456789
 Reg. No 01020304
 VAT No 111222333
 Reporting Area Durban
 * Rank Silver (Call cycle: 60)

More Details

Contact Info

Title Title of contact
 * First Name Jason
 * Last Name King
 Preferred A name the contact prefers
 Other emails Other email addresses separated with semi-colons
 Description Any narrative description
 Birthday Birthday of contact

Address

Address **New**

Type	Line 1	Line 2	Line 3	Line 4	Line 5	Post Code	Country
SHIP	1 Richmond Street	Richmond Town	Richmond City			RICH01	South Africa
SHIP	2 Upton Road	Upton Town	Upton City			UPT01	South Africa
SHIP	1 Downton Street	Downton Town	Downton City			DOW001	South Africa

CRM Info

* Main Contact? **1** Is main sales contact?
 CRM Role The contact type
 Send SMS ☐
 Contact Picture **Browse...**
 Contact Parent The manager
 Accepts Sales Calls ☒
 Send Email ☐

Submit Options

Show customer after save ☒

Save

CREATE A NEW ADDRESS

If the new contact address is not on this list:

1. As you click in the **Address** field ensure that you select **New**.

CRM Example Company

Abigail Milne

Save Contact

←

Save

Customer

Customer Search King Enterprises

Customer Details

Name King Enterprises

Holding company

Type Legal

Main Salesman Abigail Milne

Website www.kingenterprises.co.za

Phone 0123456789

Reg. No 01020304

VAT No 111222333

Reporting Area Durban

Rank Silver (Call cycle: 60)

+ More Details

Contact Info

Title Title of contact

First Name Jason

Last Name King

Preferred A name the contact prefers

Other emails Other email addresses separated with semi-colons

Description Any name description

Birthday Birthday of contact

Telephone Telephone number

Mobile Mobile phone number

Email Email address

Fax Fax number

Address

Address

New

Type	Line 1	Line 2	Line 3	Line 4	Line 5	Post Code	Country
	New						
SHIP	1 Richmond Street	Richmond Town	Richmond City			RJCH01	South Africa
SHIP	2 Upton Road	Upton Town	Upton City			UPT01	South Africa
SHIP	1 Downton Street	Downton Town	Downton City			DOW001	South Africa

Address Line 5 Address Line 5

CRM Info

Main Contact? Is main sales contact?

CRM Role The contact type

Send SMS

Contact Picture Browse...

Contact Parent The manager

Accepts Sales Calls


Send Email


Submit Options




Show customer after save

Save

1. With **New** selected,
2. You can now type in the new address in all the relevant fields


Example Company

Abigail Milne



Save Contact



Customer

Customer Search

King Enterprises

Customer Details

Name

King Enterprises

Holding company

Type

Legal

Main Salesman

Abigail Milne

Website

www.kingenterprises.co.za

Phone

0123456789

Reg. No

01020304

VAT No

111222333

Reporting Area

Durban

Rank

Silver (Call cycle: 60)

More Details

Contact Info

Title

Title of contact

First Name

Jason

Last Name

King

Preferred

A name the contact prefers

Other emails

Other email addresses separated with semi-colons

Description

Any narrative description

Telephone

Telephone number

Mobile

Mobile phone number

Email

Email address

Fax

Fax number

Address

Address

New

Address Line 1

Address Line 2

Address Line 3

Address Line 4

Address Line 5

Post Code

Country

CRM Info

Main Contact?

Is main sales contact?

CRM Role

The contact type

Send SMS

☐

Contact Picture

Browse...

Contact Parent

The manager

Accepts Sales Calls

☒

Send Email

☐

Submit Options

Show customer after save

☒

Save

THE 'CRM INFO' FRAME.

Move down the page to the **CRM Info** frame.

MAIN CONTACT

1. Hover over the **Main Contact** field to reveal a drop-down arrow. Click on this arrow to display a drop-down list with the options: **Yes** and **No**.
2. In this example, **Yes** is selected.

CRM Example Company

Abigail Milne

Save Contact

←

📁

Customer

Customer Search

King Enterprises

Customer Details

Name

King Enterprises

Holding company

Legal

Type

Legal

Main Salesman

Abigail Milne

Website

www.kingenterprises.co.za

Phone

0123456789

Reg. No

01020304

VAT No

111222333

Reporting Area

Durban

Rank

Silver (Call cycle: 60)

+ More Details

Contact Info

Title

Title of contact

First Name

Jason

Last Name

King

Preferred

A name the contact prefers

Other emails

Other email addresses separated with semi-colons

Description

Any narrative description

Telephone

Telephone number

Mobile

Mobile phone number

Email

Email address

Fax

Fax number

Address

Address

New

Address Line 1

10 Main Road

Address Line 2

Main Town

Address Line 3

Main City

Address Line 4

KZN

Address Line 5

Post Code

MAIN001

Country

South Africa

CRM Info

Main Contact?

1

Yes

No

CRM Role

2

Buying Officer

Send SMS

☐

Contact Picture

Browse...

Contact Parent

The manager

Accepts Sales Calls

☒

Send Email

☐

Submit Options

Show customer after save

☒

Save

CRM ROLE

1. Hover over the **CRM Role** field to reveal a drop-down arrow. Click on this arrow to display a **Contact Type/Role** list.
2. Select from this list the specific role that this contact holds in their company. In this example, **Buying Officer** is selected.

CRM Example Company

Abigail Milne

Save Contact

←

📁

Customer

Customer Search King Enterprises

Customer Details

Name King Enterprises

Holding company

Type Legal

Main Salesman Abigail Milne

Website www.kingenterprises.co.za

Phone 0123456789

Reg. No 01020304

VAT No 111222333

Reporting Area Durban

Rank Silver (Call cycle: 60)

+ More Details

Contact Info

Title Title of contact

First Name Jason

Last Name King

Preferred A name the contact prefers

Other emails Other email addresses separated with semi-colons

Description Any narrative description

Telephone Telephone number

Mobile Mobile phone number

Email Email address

Fax Fax number

Address

Address New

Address Line 1 10 Main Road

Address Line 2 Main Town

Address Line 3 Main City

Address Line 4 KZN

Address Line 5 Address Line 5

Post Code MAIN001

Country South Africa

CRM Info

Main Contact? Yes

CRM Role ☒ Accounts Manager

Send SMS ☒ Buying Officer

Contact Picture CEO

Contact Parent The manager

Accepts Sales Calls ☒


Send Email ☐


Submit Options




Show customer after save




Save


- Send SMS** : Select this check box if this contact accepts SMS communication.
- Accept Sales Calls** : Select this check box if this contact accepts sales calls.
 - Note** : This check box is auto selected by the system, you can un-check it, if required.
- Send Email** : Select this check box if this contact accepts Email communication.


Example Company

Abigail Milne


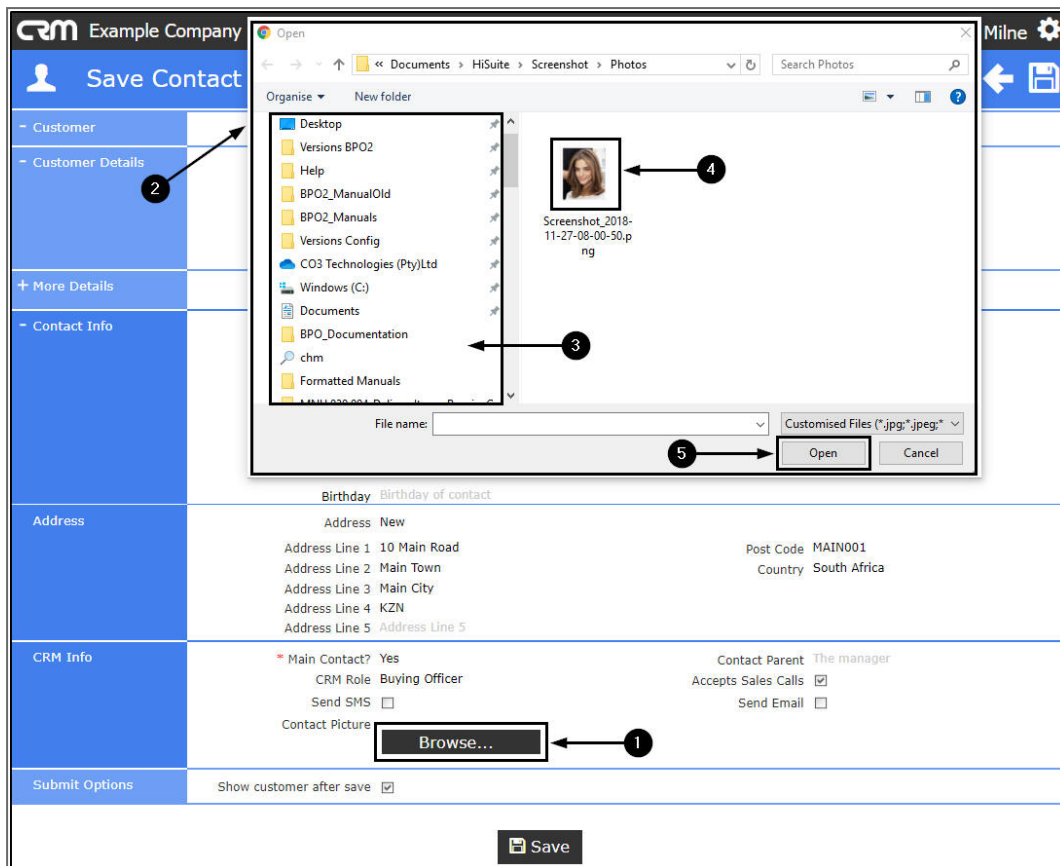

Save Contact



Customer	* Customer Search King Enterprises	
Customer Details	<div> * Name King Enterprises </div> <div> Holding company </div> <div> Type Legal </div> <div> Main Salesman Abigail Milne </div> <div> Website www.kingenterprises.coza </div> <div> Phone 0123456789 </div> <div> Reg. No 01020304 </div> <div> VAT No 111222333 </div> <div> Reporting Area Durban </div> <div> * Rank Silver (Call cycle: 60) </div>	
+ More Details		
Contact Info	<div> Title Title of contact </div> <div> * First Name Jason </div> <div> * Last Name King </div> <div> Preferred A name the contact prefers </div> <div> Other emails Other email addresses separated with semi-colons </div> <div> Description Any narrative description </div> <div> Telephone Telephone number </div> <div> Mobile Mobile phone number </div> <div> Email Email address </div> <div> Fax Fax number </div>	
Address	<div> Birthday Birthday of contact </div> <div> Address New </div> <div> Address Line 1 10 Main Road </div> <div> Address Line 2 Main Town </div> <div> Address Line 3 Main City </div> <div> Address Line 4 KZN </div> <div> Address Line 5 Address Line 5 </div> <div> Post Code MAIN001 </div> <div> Country South Africa </div>	
CRM Info	<div> * Main Contact? Yes </div> <div> CRM Role Buying Officer </div> <div> Send SMS  </div> <div> Contact Picture  </div> <div> Contact Parent The manager </div> <div> Accepts Sales Calls <input checked="" type="checkbox"/> </div> <div> Send Email  </div>	
Submit Options	Show customer after save <input checked="" type="checkbox"/>	

 Save

LINK A CONTACT PICTURE


1. Click on **Browse...**
2. An **Open** screen will pop up.
3. Double click on the file that contains the image.
4. Click on the image.
5. Click on **Open**.







1. The contact picture will be inserted into this **CRM Info** frame

CONTACT PARENT


2. Click in this field and type in the '**report to**' person for this contact e.g. the Buying Manager
 - **Note:** If there are Contact Parents set up against this customer, a drop-down arrow will appear as you hover over this field. Click on this arrow to display a list of contact parents from which you can make a selection.


Example Company

Abigail Milne



Save Contact



Customer	Customer Search King Enterprises	
Customer Details	<div> <div> Name King Enterprises </div> <div> Holding company </div> <div> Type Legal </div> <div> Main Salesman Abigail Milne </div> <div> Website www.kingenterprises.coza </div> <div> Phone 0123456789 </div> </div> <div> <div> Reg. No 01020304 </div> <div> VAT No 111222333 </div> <div> Reporting Area Durban </div> </div> <div> Rank Silver (Call cycle: 60) </div>	
More Details		
Contact Info	<div> <div> Title Title of contact </div> <div> First Name Jason </div> <div> Last Name King </div> <div> Preferred A name the contact prefers </div> <div> Other emails Other email addresses separated with semi-colons </div> <div> Description Any narrative description </div> </div> <div> <div> Telephone Telephone number </div> <div> Mobile Mobile phone number </div> <div> Email Email address </div> <div> Fax Fax number </div> </div>	
Address	<div> <div> Address New </div> <div> Address Line 1 10 Main Road </div> <div> Address Line 2 Main Town </div> <div> Address Line 3 Main City </div> <div> Address Line 4 KZN </div> <div> Address Line 5 Address Line 5 </div> </div> <div> <div> Post Code MAIN001 </div> <div> Country South Africa </div> </div>	
CRM Info	<div> <div> Main Contact? Yes </div> <div> CRM Role Buying Officer </div> <div> Send SMS </div> <div> Contact Picture </div> </div> <div> <div> Contact Parent The manager </div> <div> Accepts Sales Calls </div> <div> Send Email </div> </div>	
Submit Options	Show customer after save	

 Save

SUBMIT OPTIONS

SHOW CUSTOMER AFTER SAVE

1. This check box is auto selected. You can un-select it if you do not wish to view the customer details in the Homepage after you have saved this contact.

SAVE NEW CONTACT

2. Click on **Save**.

CRM Example Company

Abigail Milne

Save Contact

←

📁

Customer

Customer Search

King Enterprises

Customer Details

Name

King Enterprises

Holding company

Type

Legal

Main Salesman

Abigail Milne

Website

www.kingenterprises.co.za

Phone

0123456789

Reg. No

01020304

VAT No

111222333

Reporting Area

Durban

Rank

Silver (Call cycle: 60)

+ More Details

Contact Info

Title

Title of contact

First Name

Jason

Last Name

King

Preferred

A name the contact prefers

Other emails

Other email addresses separated with semi-colons

Description

Any narrative description

Telephone

Telephone number

Mobile

Mobile phone number

Email

Email address

Fax

Fax number

Address

Address

New

Address Line 1

10 Main Road

Address Line 2

Main Town

Address Line 3

Main City

Address Line 4

KZN

Address Line 5

Address Line 5

Post Code

MAIN001

Country

South Africa

CRM Info

Main Contact?

Yes

CRM Role

Buying Officer

Send SMS

☐

Contact Picture

Browse...

Contact Parent

The manager

Accepts Sales Calls

☒

Send Email

☐

Submit Options

Show customer after save

☒

Save

1. You will either return to the Homepage or Customer Homepage depending on your selection in the previous step.
2. If you selected to 'Show Customer After Save', then you will now be able to view the customer details (e.g. 12 Months Sales History) in this screen as well as customer-specific tiles that are not available in the Main Homepage.

CRM

Example Company

Abigail Milne

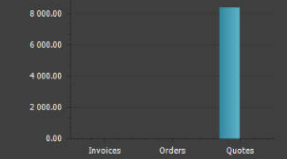
Customer Dashboard

Search

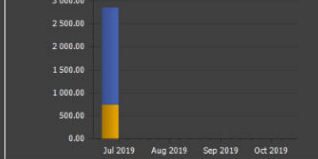
Activities for Last 30 Days

Description	Target	Existing Custmrs	New Custmrs
Phone call	10000	0	7
Email	0	0	1
Meeting	0	0	0
On Site inspection	0	0	0

1 Month Performance



4 Month Pipeline



create cold call

recommendations

warnings

customers

cases

activities

quotes

orders

invoices

credit notes

equipment


contracts

service calls

3rd party

files

King Enterprises - KIN0002



Trading Name

Registered Name

Description

VAT No

Registration

Rank

Website

Phone

King Enterprises

Solicitors Firm, 3 sites.

111222333


01020304

Silver

<http://www.kingenterprises.co.za>

0123456789

12 Months Sales History



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CRM.000.005

